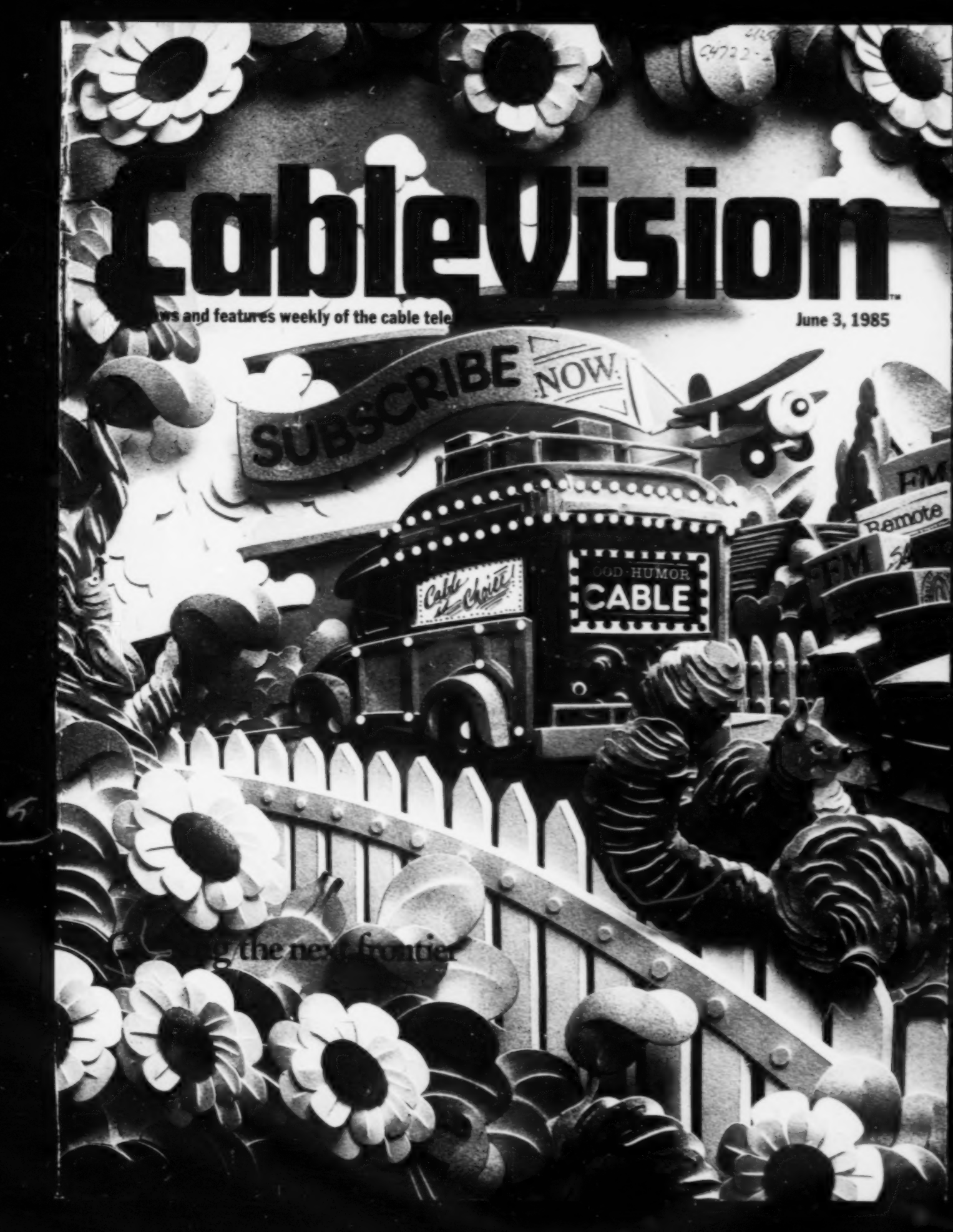
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VCR study

A recent HBO study shows videocassette rental tapes are perceived as a better value than pay TV among more VCR/pay TV households as compared to the percentage of such subscribers who see pay services as the superior value.

TCI, ATC bid for Warner Amex

TCI and ATC offer $750 million cash and assumption of a $550 million debt for Warner Amex Cable Communications.

L.A. about-face

In a radical change of course, the Los Angeles City Council has retracted an effort to see if the Preferred Communications case suit could be settled. The city now is leaning toward pursuing an appeal as far as necessary.

CATA escalates battle

The Community Antenna Television Association is urging cable operators to monitor the marketing practices of TVRO retailers and educate consumers about program scrambling. CATA will be a "repository for any misleading information."

Basic scrambling

Basic cable programmers agree on the issue, it's a definite problem. How to handle it is another matter, however. The issue? Scrambling.

PPV intentions

With pay-per-view ticketed to be a key NCTA convention topic, a number of companies are on the verge of announcing plans to enter the field or are refining PPV strategy. New developments are expected on the hardware side as well.

Major merger

First Data Resources and Gill Management Services have announced a deal in which FDR will acquire the assets of GMS. The merger creates the second-largest cable billing services company in the country.

Comband approved

The FCC has ruled that General Electric's Comband bandwidth compression system complies with government regulations. The ruling paves the way for GE to market Comband to cable operators.

Seating approved

A court decision in Ohio has paved the way for Coniston Partners to seat four of its own directors on Storer Communication's nine-member board.

'Inevitable' fee

Another basic cable network is expected to implement a per-sub fee system in 1986. The Nashville Network is eyeing a 6-to-10-cent monthly fee. This follows on the heels of a recently announced plan by Lifetime to start a monthly charge next January.

No uniformity

In a public hearing last week in Los Angeles, cable operators told the city minimum standards for franchises are acceptable, but uniformity is not.

Dual package

A trade campaign that promotes a Showtime/The Movie Channel dual pay package will be unveiled at this week's NCTA convention. The new package is aimed at the 25-to-35-year-old consumer market.

The Book Channel

Cablevision will introduce a daily prototype of a proposed 24-hour basic network in July. *The Book Channel*, will c ver new books through a mixture of author interviews, visual essays and readings.

Content the key

Claiming "content is the key" to profitability, an FCC official has said the survivors of the merger-mania will be the media companies that have increased production capability.

Upbeat convention

A crowd of 15,000 is possible as the NCTA prepares for its 34t annual convention this week in Las Vegas. One official says the pre-convention mood is "upbeat and bullish." See page 22.

Legal roundtable

On May 20, *CableVision* convened a panel of leading legal experts in Washington, D.C., to explore some of the questions on the minds of cable operators and everyone else involved with the industry. The discussion centered on what the industry perceives are its latitudes under the Cable Act and the various court actions surrounding it. See page 56.

Pay television

A growing videocassette market. New-build delays. Over-ambitious pricing structures. Signal theft. Certainly, all factors that have figured in somewhat of a slump in the pay television industry. To head off further erosion of the product, pay TV operators are mapping plans to help return them to the glory days. Editor Victoria Gits takes an in-depth look at the problems and prospects of pay TV. See page 78.

Booth Guide

Where to find everything and everyone is listed in the '85 NCTA Booth Guide that begins on page 130.

About the cover

The theme "Crossing the next frontier" is depicted on the cover in a paper sculpture by Boulder artist Chris Butler.

James Mooney

National Cable Television Association President Jim Mooney talks to Associate Editor John Wolfe and Executive Editor Fred Dawson about the current regulatory environment and what he foresees as industry goals.

Review **51**

Dazzling camerawork and the dynamic talent of Tina Turner, highlight her upcoming rock concert on HBO. Robert Dimatteo says Turner is in top form in the "hot" special filmed at England's NEC Stadium.

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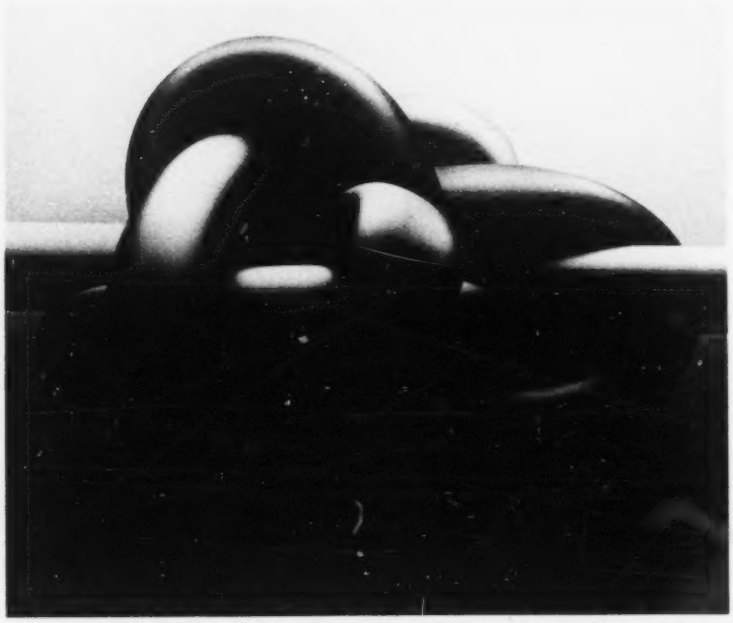

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The destiny of pay TV

Operators mapping strategy to battle erosion

—Victoria Gits

The days of selling ever-increasing numbers of pay TV subscriptions at ever-increasing prices clearly are numbered—if not over. Cable operators are up against a wall of consumer resistance. Whether the reason is theft, marketing apathy, newbuild delays, overambitious prices or the booming videocassette rental industry, depends on whom you talk to.

The evidence is gathering that some of the major pay TV suppliers are in a slump that is, at best, a temporary blip. At worst, it's a sign the product has outlived its glory days and is no longer the sure-fire money machine it used to be.

The issue has taken on a higher profile in view of the slowdown in big-city builds. If the 7 million homes in Chicago, New York, Philadelphia, Baltimore, Cleveland, Detroit, Washington, D.C. and St. Louis had seen more activity, the numbers would be different. The first-timers cover up a decline in the base. But the hiatus in construction has served to spotlight consumer behavior in mature markets. Operators are beginning to sense a shift in the foundation.

Pay TV may have reached a ceiling in terms of weekly viewing hours, as well. While cable viewing is up across-the-board in pay cable households, pay TV viewing is flat, representing a smaller share of the total.

A.C. Nielsen figures show cable satellite networks and superstations in 1983 represented nearly 10 hours of weekly viewing time per household on the average compared to pay TV's 10 hours. In 1984, the ad-supported networks jumped to 13 hours, while pay TV stayed at a little over 10 hours. In the first quarter of 1985, pay TV share was down slightly compared to the same period of 1984. Meanwhile, basic cable share was up three points. (See chart)

Mary Steenburgen and Peter Strauss star in Showtime's 'Tender is the Night.'

The factor mentioned repeatedly by cable operators and program suppliers alike as being most responsible for the drop-off was the industrywide emphasis on encouraging subscribers to sign up for basic cable, as a way penetrating deeper into the non-subscriber base. This has to be taken seriously, but there are other explanations to be considered. Whatever the reason, some operators are beginning to take action.

Making adjustments

Bob McRann, vice president and general manager, Cox Cable, San Diego (241,000 basic subscribers; 201,000 pay units) is a case in point. McRann saw spectacular growth in 1982 and 1983 after launching four new pay services, but since Disney in 1983, nothing new has come along. Compared to a year ago subscribership to HBO has slipped by 4,000, while Cinemax gained 7,000. Showtime stayed the same, while Disney added 7,000. Playboy lost 4,000.

McRann targets price as the problem. "While the quality of programming has remained relatively static, what we find is a price-value relationship that is no longer as appealing to the customer as it was before. . . A price of $10.95 to $13.95 is now beginning to be significantly felt by the subscriber. . . I think what we may have is a relative imbalance between the rates being charged for basic and pay," McRann says.

"Combine that with the videocassette threat—and there clearly is a videocassette threat out there."

In pursuit of the ideal alignment, McRann has reduced the first pay in the household from $11.95 to $10.95—at the same time raising basic rates from $11.78 to $14.95. GalaVision will come down to $6.95 from $9.10 and all remote controls are reduced by 24 percent to a flat $3 instead of $6 or $4.

On the programming side, HBO is circumspect about its numbers, refusing to confirm or deny a reported 5 percent drop in subscribership in the first quarter of 1985. Spokespersons will admit to "disappointing," results. HBO's Seth Abraham, vice president of operations, said in a published interview, "You don't have to be a rocket scientist to know that videocassette recorders are cannibalizing our ratings."

HBO's remedial actions consist of increasing its investment in original programming (by how much is unknown), touting its "sleeper" films over the

The viewpoint of the managers

The blame: From VCRs to pricing

"Let me give you the root of the problem—and I am somewhat surprised no one talks about this: 43 percent of my subscribers have VCRs. About 300 yards from my office is a Music Plus Video Store. The activity in cassette rental is substantial. For a cable customer to see everything that comes out of Paramount and everything that comes out of TriStar, they have to buy two or three pay services. That is driving my customers to video stores. Therein is a major problem that no one seems to have recognized yet. The pay suppliers think they are terrific, because they have exclusivity in a given studio. Not so. They're getting hurt because of it. . . You can take that $24 (the price of two pay channels) to the video store on Friday and get precisely what you want—or settle for something—and spend less—about $10 to $12 per month. And they are very proud of their frugal expenditures. This is not a video game syndrome—VCRs are here to stay."

McNellis says there has definitely been an impact on the bottom line. "To date, we definitely have experienced a revenue loss. We are not growing incrementally as healthily as we should."

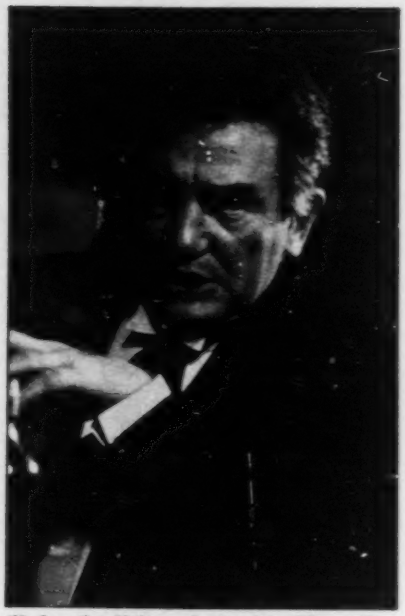
McNellis has a tough market to pene-

(Cont. on page 82)

blockbusters, increasing the number of movie titles and reducing repeats.

Showtime concedes there has been a "softness" in the market, but that more attention to marketing and higher quality, innovative original programming are the best remedies. At the same time, it is moving ahead to create a national pay-per-view network, clearly a response to the competitive advantage of videocassette rental over pay TV.

After just over two years in operation, The Disney Channel reports an increase of 300,000 subscribers since the first of the year, bringing the total to 1.8 million. Disney has the advantage of not having a direct competitor in its genre; plus, it is priced at the lower-end of the spectrum at $6 to $8 to the subscribers.



'Under the Volcano,' starring Albert Finney, is showing on Cinemax in June.

Jim Jimirro, president of The Disney Channel, says unlike HBO or Showtime, Disney is protected against exposure in the videocassette rental market by the fact it controls its own creative product, as well as the distribution of it.

Although operators complain about churn with Playboy, the company says it is adding subscribers with 790,000 in April, compared to 700,000 a year ago.

Two contenders that stand to gain by being priced lower than the leaders at this time are Bravo and American Movie Classics. The product of a partnership between Cablevision Systems, CBS, Cox Communications and Daniels & Associates, the two are packaged under the name Rainbow Services.

Since 1980, Bravo has collected a total of 335,000 subscribers in 221 systems, says a company spokesperson. AMC serves 235,000 subscribers in 100 systems. Bravo consists of performing arts and international films, while AMC features vintage movies. The owners hope to gain a larger following by pushing the family-oriented nature of the programming and the fact that viewers are unlikely to see the same features on Showtime or HBO.

More choices

Opinions vary all over the lot as to whether the rental mode is cutting deeply, if at all, into ranks of pay TV subscribers. But you don't need a research study to recognize that cassettes have the following advantages that pay TV does not: 1) Recent releases are available on cassette six to nine months before they are shown on pay TV; 2) A viewer can select one title only; 3) Cassettes can be watched on the viewers schedule, stopped and started on a whim.

True, you have to go through the hassle of getting to the store and checking it out. There's a good chance the title that everybody wants won't be there. But the price of three rental movies today is roughly equivalent to the price of a pay channel.

The resolution of these conflicting considerations in the minds of cable subscribers who own VCRs is a topic which the most daring thinkers find easy to resist. In the long run, the solution to that equation will determine the course of events.

Operators who are investing in pay-per-view justify the expense as a means of competing with rentals and a way of fighting pay TV erosion. Those who reject pay-per-view schemes tend to believe rentals have a negligible impact on pay TV subs and look to marketing and content improvement for growth.

One analyst who has followed pay TV for many years is Tony Hoffman, director of corporate finance of Cralin & Co. Hoffman sums up HBO's problem this way: "Now that they are where they are, the strategy (they started with) is coming back to bite them."

A plethora of choices is a bonafide selling point for a couple of years after launch time. Says Hoffman: "The problem is after two or three years as a cable subscriber, you have seen the inventory of films and are now reduced to looking through the guide for something new you want to see in the very short list of new movies coming on that month. That's a limited list. Maybe six or eight films and a couple of specials. Not everybody wants to see every film. The only portion people are interested in is about one-half to a third. Yet, you are still spending the same amount of money or more—as when you started out. Now the cost-benefit analysis shifts rather dramatically. . . People are saying 'I don't need Home Box Office when I can get the movies sooner and cheaper through cassette rentals.' "

Hoffman does not conclude the balance of power will shift to the pay TV alternatives, rentals and pay-per-view, but that the revenues will be divided differently. "One thing is not going to displace the other," he says.

Add-on income

Frank Biondi, formerly chairman and CEO of HBO, takes an accommodating view of the future of pay television in his new role as executive vice president, entertainment business sector of Coca Cola Inc., the parent of Columbia Pictures. Biondi enthusiastically promotes pay-per-view, but he objects to the theory that pay-per-view will succeed at the expense of pay TV.

He answers the question on videocassette rentals by saying, "Clearly, people are using their VCRs, particularly on Saturday nights, which are big pay TV nights. It's the same product as pay in an earlier window. You can make the argument that at least some portion of the subscriber universe finds it as convenient, if not more so, than a subscription service. Logically, it just presents more competition. . . I think the basic channels present more competition. They're just better than they were five years ago. . . The longer it takes the industry to build the next 20 million homes, the more likely it is that the next 20 million VCRs will wind up in those unbuilt homes. And those, I would argue in theory are tougher sells for pay TV."

The movie studios endorse pay-per-view because it returns a bigger split than rentals. They have a vested interest in seeing it succeed, and they are not likely to rearrange the distribution sequence to give pay networks the window immediately following theatrical run, Biondi says. "The combination of pay and home video is a lot bigger than pay was three years ago."

He argues that operators should embrace the pay-per-view alternative, saying the income would not simply detract from pay TV, but represent *add-on* income. In that he is in agreement with analysts who say there is a segment of the audience that will pay a premium to be the first—like Tony Hoffman's "super consumers."

Old goods

What is happening to pay TV is not unlike what happened to the broadcast networks when pay TV started coming on strong, says Paul Bortz, managing director of Browne, Bortz and Coddington, a Denver consulting firm. He sees more price reductions in store for pay

(Cont. on page 90)

(Cont. from page 80)
channels and concludes pay-per-view is the best defense against continued erosion prompted by VCR use.

"Five years ago, pay TV movies were new goods. The first time you had a chance to see it outside the theater (was on pay TV) and the networks had to move away quickly from movies because they were showing old goods that simply don't draw. Now the pay channels are old goods for homes that have VCRs.

"The studios have to recognize they are selling a less valuable product and the HBOs have to recognize it's a less valuable product for the cable operator and the cable operators therefore are selling a less valuable product to the subscriber. And therefore, the only solution for what I now call the second-run movie services is to substantially reduce the cost—it's old goods."

Bortz has little faith that original programming will bring in droves of viewers.

Bortz thinks pay-to basic ratios will settle out at 1.3 or even lower, if discounts don't stem the drain. He says pay-per-view has a good chance to recoup the difference, though it's bound to have some negative effect on the other pay services. "The question is how much."

He doesn't expect the pay services to look a lot different in the future than they do now, but they'll be a lot less expensive."

Weekly viewing in all cable households

Total Day

	1st Qtr 1983 Hrs: Mins/share		1st Qtr 1984 Hrs: Mins/share		1st Qtr 1985 Hrs: Mins/share		% Change 1984 vs. 1985	% Change 1983 vs. 1985
Cable Services								
Satellite networks	5:14	9	7:13	12	8:25	14	+16.5	+60.8
Superstations	4:15	8	4:49	8	5:12	9	+7.8	+22.2
Total Ad-supported cable	9:29	17	12:02	20	13:37	23	+13.1	+43.5
Pay services	5:59	11	5:56	10	5:59	10	+1.0	0
Broadcast services								
Network affiliates	35:17	63	35:40	60	33:14	57	−6.8	−5.8
Independents	7:25	13	7:57	13	7:32	13	−5.2	+1.5
Public	1:46	3	1:43	3	1:53	3	+9.7	+6.0
Total usage	56:23		59:38		58:27		−2.0	+3.7

Note: Minutes do not sum to total usage due to multi-set households
Source: A.C. Nielsen
Prepared by Cabletelevision Advertising Bureau

In-between solution

Mark Riely, a media analyst with F. Eberstadt, New York, concurs with the theory that pay TV prices climbed beyond the limit of what the market will bear because operators were stymied by regulation from raising the rates on basic.

He agrees with Bortz that pay channels will come down in price. The VCR boom, says Riely, "has had an impact, but not a serious impact." The future presents plenty of opportunity, Riely says, for low- to mid-priced alternatives like Bravo, Cinemax and American Movie Classics.

While pay-per-view and rentals will become the vehicles for recent releases, where is a niche for the movie-based pay channel for the viewer segment willing to wait a few months, Riely says. The trick is to position pay TV somewhere between pay-per-view and the commercial networks.

Riely envisions a "continuum of demand" and several layers of pricing. "It will be a graceful evolution," he says, theorizing the pie will get bigger as choices expand.

Because VCR penetration has not reached its peak, observers disagree on the ultimate impact videocassette rentals will have on pay TV subscriptions.

A Showtime-sponsored study released in February showed that compared to non-VCR owners, VCR owners were more likely to subscribe to one or more pay TV channels and were less likely to disconnect.

A study by the Yankee Group showed that more VCR owners subscribed to pay (71 percent) than did the general population of cable subscribers (54 percent).

But that could change as VCR ownership proliferates and there is still a lot of room to grow. The Yankee Group estimates the nationwide VCR penetration is 25 to 28 percent of television households or nearly 20 million homes to date. The Yankee Group estimates some 53 million will be installed by 1988.

Yankee Group analyst Donna Amrhein says more recent research indicates—inconclusively—a slight negative effect on pay TV. "Viewership hours have not gone down," she says, "but the mix is changing in favor of more viewing of pre-recorded videocassettes."

Amrhein concludes the VCR is a positive incentive to take pay channel, if the user is a basic-only subscriber. But if the VCR owner is a multipay subscriber, the tendency is to downgrade. Stiff competition in video rentals is prompting a price war that makes renting deceptively attractive. The margins are so low, it won't go on forever, Amrhein says.

John Borden, director of research of the Yankee Group, says the pay networks' "rather desperate search for a pay-per-view" scheme is evidence of the impact of the early-window advantage in videocassette rentals.

"If it was movies with commercials (before VCRs)," Borden says, "now it's without commercials." Borden speculates pay-per-view may become the new commercial-free alternative. Pay TV may be forced to find an in-between solution—including accepting subdued commercial messages, like institutional ads, and "grant-from" announcements.

Borden remains unconvinced that pay-per-view is the cable operators' panacea. Given the advantages of videocassette rentals in terms of selection, scheduling and flexibility, he wouldn't give pay-per-view better than a 50-50 shot of replacing any of the incremental revenue captured by home video—unless the pay-per-view window were moved ahead of rental video.

The future of pay television rests on the outcome of trends that are still developing. Exploring the trends brings up even more questions to be answered: True, consumers have responded to the opportunity afforded by the VCR, but is it a temporary diversion—not a replacement for the 24-hour movie channel? To what extent, if any, will pay per-view cut into the ranks of pay TV subscribers? Can pay TV recreate itself month after month with "must-see" specials, series and movies that clinch viewer loyalty. Is there room for everybody to prosper in the context of consumers' insatiable appetite for video—or has the industry hit the limit?

The only sure thing is the pay-channel format is in the company today of a band of competitive outlets, the dimensions of which were insignificant few years ago. How the industry responds may be its biggest challenge yet. ■

Cable services subscriber count

Satellite-fed national services

Basic services	Affiliates	Subscribers
ACTS Satellite Network	182	2,955,000
Arts & Entertainment	2,000	12,500,000
Black Entertainment Television (BET)	432	9,033,719
Cable News Network (CNN)	7,780	32,262,000
CNN Headline News	2,403	16,284,000
C-SPAN	1,900	21,000,000
CBN Cable Network	5,551	28,017,000
Country Music Television	314	4,900,000
ESPN	9,900	35,700,000
Eternal Word Television Network(EWTN)	232	2,400,000
Financial News Network (FNN)	1,050	18,100,000
The Learning Channel	661	5,735,700
Lifetime	2,400	24,900,000
Modern Satellite Network (MSN)	51	10,550,000
Music Television (MTV)	3,100	26,200,000
The Nashville Network	2,250	22,160,000
National Christian Network (NCN)	91	1,333,000
National Jewish Television (NJTV)	247	5,569,000
Nickelodeon	3,800	24,900,000
PTL The Inspirational Network	1,200	13,000,000
Satellite Program Network (SPN)	525	11,800,000
Silent Network	242	7,200,000
SIN Television Network†	348	29,405,100
Trinity Broadcasting Network	409	5,772,000
USA Network	4,200	29,700,000
Video Hits One	423	5,500,000
The Weather Channel	1,630	17,000,000
WGN-TV	6,515	15,714,000
WOR-TV	1,378	5,231,220
WPIX-TV	152	1,385,000
WTBS-TV	8,656	33,111,000

Pay services		
American Extasy	4	40,000
American Movie Classics	90	235,000
Bravo	210	335,000
Cinemax	3,200	3,333,000
The Disney Channel	2,300	1,800,000
GalaVision	230	160,000
Home Box Office (HBO)	6,900	14,500,000
Home Theater Network (HTN)	400	300,000
Showtime	3,200	5,400,000
The Movie Channel	2,900	3,200,000
The Nostalgia Channel	55	175,000
The Playboy Channel	550	800,000

Audio services		
Cable Radio Network	5	300,000
Lifestyle	125	2,400,000
Moody Bible Institute	47	600,639
Satellite Jazz Network	14	828,000
Satellite Radio Network	50	403,000
Star Ship Stereo	3	146
WFMT Chicago	158	1,041,000

Text services		
AP News Cable	350	4,000,000
AP News Plus	6	145,000
Cable Sportstracker	5	275,000
Dow Jones Cable News	170	2,372,784
Electronic Program Guide (EPG)	235	4,484,000
Genesis Storytime	20	630,000
Reuters News View	325	3,250,000
TV Decisions	106	2,826,401
UPI Data Cable	450	4,000,000

Non-satellite-fed national services

Bicycled services	Affiliates	Subscribers
Fuji Network	6	4,655
Nippon Golden Network	7	8,400
Vector Consumer News	12	325,000
Vector Consumer Shopping Guide	15	407,000

Regional entertainment services

Basic services	Affiliates	Subscribers
Atlanta Interfaith	7	150,000
Bay Area Religious Channel (BARC)	6	113,400
Buffalo Sabres Hockey	13	460,000
The Ecumenical Channel	6	148,000
KTVT	46	1,074,000
Life Newsvision	24	36,000
Madison Square Garden	57	1,800,000
Meadows Racing Network	14	446,000
MetroChannel	1	116,000
Newsday Cable	1	240,019
Texas Cable Network	12	730,000

Pay services		
Dodgervision	28	NA
Home Sports Entertainment—Houston/Dallas	78	130,000
Home Team Sports	47	83,000
New England Sports Network	72	53,279
PRISM-Philadelphia	88	375,000
Pro-Am Sports	84	102,000
The Superchannel	NA	NA
SportsChannel (New England)	63	95,000
SportsChannel (New York)	45	400,000
SportsVision (Chicago)	22	105,000
Z-Channel	21	95,000

Announced services

Regional services	Expected Launch
Box Seat	2nd quarter 1985

Satellite-fed services	
Apollo Entertainment Television	TBA
The BuenaVision Channel	TBA
Cabletix	TBA
The Choice Channel	11/85
The Discovery Channel	6/85
Discovery Computer Network	9/85
Discovery Financial Network	9/85
Discovery Music Network	6/85
El Canal Musical	4th quarter 1985
Ethnic Radio Networks	2nd quarter 1985
The Exchange	4th quarter 1985
Home Shopping Network	7/85
International Business Network	3rd quarter 1985
Magicable	TBA
Movie Time	9/85
Satellite Concert Network	TBA
Studioline Cable Stereo	6/85
United Satellite Network	3rd quarter 1985
X*Press	6/85

Note: Figures for affiliate and subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision Magazine, Attention Cable Stats, P.O. Box 5208-T.A. 80217.
NA denotes not available.
TBA denotes to be announced.

† Total SIN reach. Spanish-speaking households 3,860,500.
Source: Subscriber and affiliate counts are provided by the program service for International Thomson Communications Inc.

Top 100 MSOs

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	3,660,938	(3/85)
2.	American Television and Communications Corp.	2,500,000	(2/85)
3.	Group W Cable	2,093,794	(3/85)
4.	Cox Cable Communications	1,521,667	(3/85)
5.	Storer Cable Communications	1,500,000	(3/85)
6.	Warner Amex Cable Communications, Inc.	1,204,000	(3/85)
7.	Continental Cablevision	1,033,000	(4/85)
8.	Times Mirror Cable Television, Inc.	978,340	(3/85)
9.	Newhouse Broadcasting	910,190	(4/85)
10.	United Cable Television	806,000	(3/85)
11.	Viacom Cablevision	800,000	(4/85)
12.	UA Cablesystems Corp.	713,000	(4/85)
13.	Sammons Communications, Inc.	659,716	(4/85)
14.	Cablevision Systems Development Co.	596,799	(3/85)
15.	Rogers Cablesystems, Inc.	589,357	(4/85)
16.	Comcast Cable Communications	481,000	(3/85)
17.	Jones Intercable Inc.	473,337	(4/85)
18.	Telecable Corp.	453,094	(3/85)
19.	Heritage Communications, Inc.	447,192	(3/85)
20.	McCaw Communications	382,000	(3/85)
21.	Capital Cities Cable, Inc.	375,000	(4/85)
22.	Wometco Cable TV, Inc.	301,009	(4/85)
23.	Prime Cable Corporation	292,405	(3/85)
24.	Daniels & Associates	287,457	(3/85)
25.	Centel Cable Television Company	281,155	(4/85)
26.	TCA Group	270,611	(3/85)
27.	Multimedia Cablevision, Inc.	268,397	(3/85)
28.	American Cablesystems Corporation	258,800	(4/85)
29.	Cable Vision Industries	256,342	(3/85)
30.	MacLean Hunter Cable TV Ltd.	244,606	(3/85)
31.	Scripps-Howard	234,742	(3/85)
32.	TeleScripps	219,714	(3/85)
33.	Colony Communications, Inc.	213,601	(3/85)
34.	Tribune Cable Communications	198,020	(4/85)
35.	Rollins Cableview, Inc.	194,389	(3/85)
36.	Adelphia Communications	194,343	(4/85)
37.	Century Communications Corporation	192,023	(8/84)
38.	Service Electric Cable T.V., Inc.	189,500	(4/85)
39.	Communications Service, Inc.	179,000	(12/84)
40.	Tele-Media	172,438	(8/84)
41.	TKR Cable	159,000	(3/85)
42.	Western Communications	154,086	(3/85)
43.	Cablentertainment	149,873	(4/85)
44.	Adams-Russell Communications	143,173	(3/85)
45.	Harte-Hanks Communications	140,569	(3/85)
46.	McDonald Group	139,585	(12/84)
47.	Falcon Cable	133,000	(3/85)
48.	Harron Communications Corporation	132,649	(10/84)
49.	Sutton Capital Group	127,098	(3/85)
50.	Buckeye Cablevision	121,000	(2/85)
51.	Midwest Video Corporation	118,102	(12/84)
52.	Harris Cable Corporation	117,827	(3/85)
53.	Televents, Inc.	111,743	(3/85)
54.	Lenfest Group	111,388	(3/85)
55.	Armstrong Utilities	110,988	(3/85)
56.	Greater Media	103,139	(4/85)
57.	Summit Communications, Inc.	97,787	(3/85)
58.	Communications Systems, Inc.	94,655	(4/84)
59.	Multi-Channel TV Company	93,657	(3/85)
60.	Cencom Cable Associates, Inc.	91,587	(4/85)
61.	Perry Cable TV Corporation	86,621	(3/85)
62.	U.S. Cable Corporation	85,000	(3/85)
63.	King Videocable Company	84,929	(3/85)
64.	McClatchy Newspapers	83,183	(3/85)
65.	The Essex Group	81,659	(3/85)
66.	WEHCO Video, Inc.	80,199	(3/85)
67.	Cable Management Associates, Inc.	77,030	(3/85)
68.	Palmer Communications, Inc.	76,423	(3/85)
69.	Midcontinent Cable Systems Company	73,887	(3/85)
70.	Omega Communications	73,677	(3/85)
71.	Booth Communications Company	71,364	(3/85)
72.	Susquehanna Broadcasting	69,751	(3/85)
73.	Pencor Services, Inc.	67,133	(3/85)
74.	Sonic Cable T.V.	63,930	(8/84)
75.	Acton Corporation	63,274	(1/85)
76.	Media General Inc.	61,037	(3/85)
77.	Clear T.V. Cable Associates, Ltd.	59,488	(4/85)
78.	Selkirk Communications	58,823	(4/85)
79.	Marsh Media	56,745	(3/85)
80.	Omni Cable T.V. Corporation	56,718	(3/85)
81.	Coaxial Communications	55,471	(3/85)
82.	Helicon Corporation	55,000	(4/85)
83.	The Daily Press	53,000	(3/85)
84.	National Telecommunications Corporation	51,300	(12/84)
85.	United Video Management	49,444	(3/85)
86.	Masada Corporation	48,700	(3/85)
87.	Wisconsin Cablevision and Radio Co., Inc.	48,670	(3/85)
88.	Simmons Communications	48,386	(3/85)
89.	First Carolina Communications, Inc.	48,384	(3/85)
90.	Communicom	47,694	(1/85)
91.	Bresnan Communications	44,664	(3/85)
92.	Joseph Gans Cable T.V.	43,838	(3/85)
93.	Chambers Communications Corporation	43,303	(3/85)
94.	Whitney Communications Corporation	42,805	(3/85)
95.	Matrix Enterprises	42,606	(3/85)
96.	Northland Communications Corporation	42,500	(4/85)
97.	Donrey Cablevision	41,586	(3/85)
98.	Dowden Communications	40,252	(3/85)
99.	Cable Holdings Inc.	40,200	(4/85)
100.	New England Cablevision	38,061	(3/85)

Subscriber counts are provided by MSOs and systems to International Thomson Communications Inc.

Top 100 systems

Rank	Location	Operator	Basic subs	
1.	San Diego, CA	Cox Cable	256,415	(3/85)
2.	Woodbury (Long Island), NY	Cablevision Systems Development	238,950	(3/85)
3.	Manhattan, NY	ATC	206,900	(12/84)
4.	Florida Division (Orlando/Ormond Beach)	ATC	195,700	(12/84)
5.	San Antonio, TX	Rogers Cablesystems	190,979	(4/85)
6.	Houston, TX	Warner Amex	185,000	(3/85)
7.	East Orange, NJ	MacLean Hunter	172,246	(3/85)
8.	Honolulu, HI	ATC	156,400	(12/84)
9.	Wayne, NJ	UA Cablesystems	138,000	(4/85)
10.	Tulsa, OK	United Cable	134,989	(4/85)
11.	Cincinnati, OH	Warner Amex	133,000	(3/85)
12.	Englewood, CO	United Cable	125,406	(3/85)
13.	Audubon, NJ	New York Times	123,134	(4/85)
14.	Rochester, NY	ATC	117,100	(12/84)
15.	Atlanta, GA	Prime Cable	116,642	(3/85)
16.	Baltimore County, MD	Comcast Cable	115,000	(3/85)
17.	Erie County, NY	Prime Cable	114,908	(4/85)
18.	Tidewater (Norfolk), VA	Cox Cable	113,888	(3/85)
19.	San Jose, CA	Gill Industries	106,724	(4/85)
20.	Memphis, TN	ATC	106,300	(12/84)
21.	Jacksonville, FL	Continental	106,000	(3/85)
22.	Austin, TX	ATC	102,500	(12/84)
23.	Seattle, WA	Group W	101,844	(3/85)
24.	Charlotte, NC	ATC	101,700	(12/84)
25.	San Juan, PR	Harris Cable	101,411	(3/85)
26.	Toledo, OH	Buckeye Cablevision	100,233	(4/85)
27.	Central Islip (Long Island), NY	Viacom	99,838	(3/85)
28.	Manhattan, NY	Group W	99,341	(3/85)
29.	Jefferson Parish, Kenner, LA	Cox Cable	93,666	(3/85)
30.	San Diego, CA	ATC	92,100	(12/84)
31.	San Francisco, CA	Viacom	89,000	(4/85)
32.	Warren, NJ	TKR	88,470	(3/85)
33.	Los Angeles, CA	Falcon Communications	88,137	(2/85)
34.	Wilmington, DE	Rollins Cableview	86,432	(3/85)
35.	Grand Rapids, MI	UA Cablesystems	86,000	(4/85)
36.	Seattle, WA	Viacom	85,000	(4/85)
37.	Wichita, KS	Multimedia Cablevision	83,985	(3/85)
38.	Jackson, MS	ATC	80,700	(12/84)
39.	Dallas, TX	Warner Amex	80,000	(3/85)
40.	Pompano Beach, FL	American Cablesystems	77,700	(4/85)
41.	Pittsburgh, PA	TCI	77,541	(4/85)
42.	Broward County, FL	Storer	76,000	(3/85)
43.	Phoenix, AZ	Times Mirror	75,638	(3/85)
44.	Boston, MA	Cablevision	75,324	(3/85)
45.	Baton Rouge, LA	Daniels & Associates	74,820	(3/85)
46.	Clearwater, FL	Vision Cable	74,500	(4/85)
47.	New Orleans, LA	Cox Cable	73,766	(3/85)
48.	Indianapolis, IN	Indianapolis Cablevision	72,496	(4/85)
49.	Tacoma, WA	Cable TV of Puget Sound	72,044	(4/85)
50.	Flint, MI	Comcast	72,000	(3/85)
51.	Richmond/Henrico County, VA	Continental	70,700	(3/85)
52.	South Texas, TX	Heritage	70,130	(3/85)
53.	Greensboro, NC	ATC	69,200	(12/84)
54.	Jefferson County, KY	Storer	69,000	(3/85)
55.	Cleveland Heights, OH	Viacom	69,000	(4/85)
56.	South Bend, IN	Heritage	68,347	(3/85)
57.	Santa Monica, CA	Group W	67,863	(3/85)
58.	Louisville, KY	Times Mirror	67,855	(3/85)
59.	Omaha, NE	Cox Cable	66,592	(3/85)
60.	Raleigh, NC	ATC	65,800	(12/84)
61.	Nashville, TN	Viacom	65,000	(4/85)
62.	Kansas City, MO	ATC	64,800	(12/84)
63.	Columbus, OH	Warner Amex	64,679	(3/85)
64.	St. Petersburg, FL	Group W	63,802	(3/85)
65.	Akron, OH	Warner Amex	63,562	(3/85)
66.	Buffalo, NY	TCI	63,220	(11/84)
67.	Boston Complex (Malden), MA	Warner Amex	63,180	(3/85)
68.	Worcester (Leicester), MA	Greater Media	63,073	(3/85)
69.	Oklahoma City, OK	Cox Cable	62,726	(3/85)
70.	Syracuse (suburbs), NY	NewChannels Corp.	62,463	(4/85)
71.	Fayetteville, NC	ATC	62,100	(12/84)
72.	Allentown, PA	Service Electric	62,000	(4/85)
73.	El Paso, TX	Group W	61,483	(3/85)
74.	Hartford, CT	Times Mirror	61,440	(3/85)
75.	Chicago Suburbs (Oak Park), IL	Cablevision Systems	61,285	(3/85)
76.	Madison, WI	TCI	61,257	(4/85)
77.	Monterey, CA	Western Communications	60,656	(3/85)
78.	Santa Barbara, CA	Cox Cable	60,616	(3/85)
79.	Mt. Prospect, IL	Cablenet	60,000	(3/85)
80.	Sarasota, FL	Storer	60,000	(3/85)
81.	Birmingham, AL	ATC	59,400	(12/84)
82.	Snohomish County, WA	Viacom	59,000	(4/85)
83.	Ft. Worth, TX	Sammons	59,000	(4/85)
84.	Harrisburg, PA	Sammons	58,647	(4/85)
85.	Bridgeport, CT	Cablevision Systems/ Scripps Howard	58,525	(3/85)
86.	Las Vegas, NV	Times Mirror	58,402	(3/85)
87.	New Britain, CT	United Cable	58,282	(12/84)
88.	New Haven, CT	Storer	58,000	(3/85)
89.	Des Moines, IA	Scripps-Howard Heritage	57,918	(3/85)
90.	Indianapolis, IN	ATC	57,100	(12/84)
91.	West Palm Beach, Fla.	Group W	57,087	(3/85)
92.	Stamford (Fairfield), CT	Cablevision Systems Development	56,321	(3/85)
93.	Knoxville, TN	TCI	56,303	(1/85)
94.	Albany, GA	Storer	56,000	(3/85)
95.	Binghamton, NY	NewChannels Corp.	55,687	(4/85)
96.	Shreveport, LA	ATC	55,500	(12/84)
97.	Knoxville, TN	TeleScripps	55,500	(4/85)
98.	Columbus, OH	Coaxial Communications	55,451	(3/85)
99.	Chattanooga, TN	TeleScripps	55,284	(3/85)
100.	Westchester County (New Rochelle), NY	UA Cablesystems	55,000	(4/85)